A2500-2

# Paper Paperboard & Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol. 62 - No. 12 DECEMBER 1984

## PAPER AND PAPERBOARD PRODUCTION

The rate of paper and paperboard production in October and November 1984 eased a bit from the strong pace of the first half of the year. The trend rate for those months (the average of the October and November seasonally adjusted annual rates) was 67.9 million tons per year, compared with a high of 70.0 million tons per year experienced in the earlier months of the year.

Data for the early weeks of December indicate that production is holding close to the November level. Should production continue at this level until the usual shutdown period of the last week of the month, the 1984 total would be between 68.5 and 68.8 million tons.

Among the paper grades, printing and writing papers show some weakness. Early data indicate that new orders for printing papers continued below the rate of shipments in November, indicating further easing in the unfilled order backlogs; the seasonally adjusted rate of production of printing, packaging and tissue papers showed a small decline. Newsprint production in November (seasonally adjusted) was close to its October rate. The 1983-1984 data on kraft paper production have been revised downward by about 4% as a result of re-analysis of API's share total production. This reduces the 1983 and 1984 estimates of total paper production by 0.4% and of total paper and paperboard output by 0.2%.

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The quarterly patterns in paper production reflect the changes in Real Gross National Product. After a very strong first half, the growth in real GNP slowed to a rate of less than 2% per year, suggesting a slower growth in the use of paper for advertising and other communication.

Paperboard demand is directly affected by the production of goods as measured in the Industrial Production Index. The rate of growth in industrial production flattened to near-zero in the closing months of 1984, compared to an 11% per year growth rate in the first half of the year. Nevertheless, the level of both industrial production and real GNP remains high, and the 1984 total for paper and paperboard production are both pointing to record highs of their own.

The rates of production of all the major paperboard grades -- unbleached kraft, semichemical, bleached kraft and recycled paperboard also eased somewhat in October and November from their third quarter rates. Nevertheless, the 1984 total of all paperboard grades will probably show a gain of at least 6.5% above its 1983 level. Production of recycled paperboard, while down from its highs of the earlier months of this year, appears to be moving to a level in excess of 7.9 million tons for the year. This total would surpass the record-high rates reached in the early 1970's.

The modest decline in the trend in production of containerboard grades, largely made up of kraft linerboard and semichemical paperboard, is consistent with the current trend in shipments of corrugated shipping containers. The Fibre Box Association reports that the seasonally adjusted rate of shipments of these containers in October and November 1984 averaged 261 billion square feet per year, compared to an average rate of 269 billion square feet per year in the first nine months of 1984. The November 1984 rate of shipments just about matched its relatively high rate of November 1983. If the December 1984 output matches its year-ago level, total 1984 shipments would be a record-high 271 billion square feet, 7.3% above the previous high established in 1983.

Continued on Page 10

## PAPER AND PAPERBOARD STATISTICS

### PRODUCTION, SHIPMENTS AND ORDERS
(Thousands of Tons)

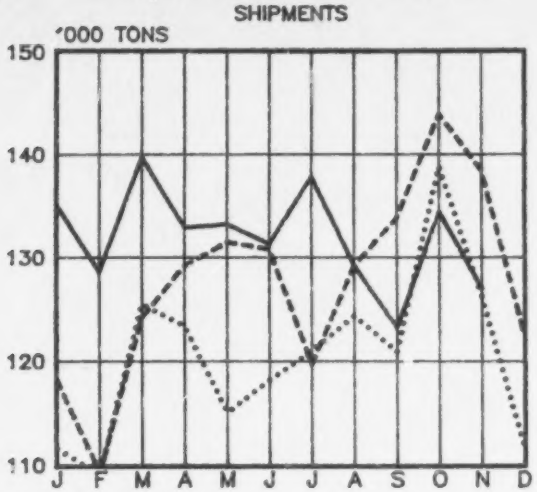
| | YEAR 1982 | YEAR 1983 | AUG. 1984 | SEPT 1984 | OCT. 1984 | NOV. 1984 | Annual Rate Y-T-D 1984 | % Change From same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| PAPER | | | | | R | P | | |
| Newsprint - Production | 5042 | 5167 | 470 | 457 | 474 | 460 | 5579 | 7.5 |
| - Shipments | 4988 | 5153 | 459 | 451 | 469 | 466 | 5621 | 9.1 |
| Printing & Writing | 15611 | 17387 | 1561 | 1465 | 1624 | 1495 | 18504 | 6.5 |
| Groundwood Paper - Shipments | 1471 | 1531 | 129 | 123 | 134 | 127 | 1584 | 3.1 |
| - New Orders | 1481 | 1581 | 150 | 123 | 138 | 113 | 1601 | 0.7 |
| - Unfilled Orders | 92 | 145 | 166 | 168 | 171 | 159 | 159 | 4.1 |
| Coated Paper - Shipments | 4974 | 5696 | 538 | 496 | 553 | 518 | 6232 | 9.8 |
| - New Orders | 4941 | 5864 | 545 | 479 | 537 | 514 | 6192 | 6.5 |
| - Unfilled Orders | 322 | 513 | 488 | 482 | 455 | 452 | 452 | -2.3 |
| Unctd Free Sheet - Shipments | 7855 | 8767 | 771 | 727 | 804 | 729 | 9205 | 5.1 |
| - New Orders | 7827 | 9076 | 724 | 712 | 796 | 712 | 8870 | -2.4 |
| - Unfilled Orders | 321 | 687 | 401 | 395 | 387 | 371 | 371 | -43.5 |
| Thin Paper - Shipments | 329 | 328 | 28 | 27 | 30 | 26 | 341 | 3.0 |
| Cotton Fiber Paper - Shipments | 120 | 131 | 13 | 12 | 12 | 10 | 141 | 7.6 |
| Bleached Bristols - Production | 862 | 934 | 82 | 81 | 91 | 86 | 1000 | 7.3 |
| Tissue Paper - Production | 4438 | 4789 | 411 | 409 | 425 | 400 | 4873 | 1.5 |
| Total Packaging & Other Paper | 5300 | 5491 | 466 | 451 | 468 | 428 | 5639 | 2.4 |
| Unbl. Kraft Paper - Shipments | 3688 | 3665 | 304 | 302 | 313 | 289 | 3721 | 1.1 |
| Other Paper - Production | 1612 | 1925 | 162 | 149 | 155 | 139 | 1918 | 4.9 |
| TOTAL PAPER-Production-Unadj. * | 30390 | 32833 | 2907 | 2782 | 2991 | 2783 | 34595 | 5.3 |
| -Production-S.A. * | | | 2796 | 2901 | 2882 | 2803 | 34345 | 4.9 |
| PAPERBOARD - PRODUCTION | | | | | | | | |
| Solid Wood Pulp Furnish | 22589 | 24779 | 2323 | 2222 | 2234 | 2134 | 26704 | 7.0 |
| Unbl. Kraft Linerboard (1) | 13494 | 15001 | 1421 | 1375 | 1349 | 1307 | 16230 | 7.2 |
| Production for Export | 1931 | 2281 | 214 | 174 | 131 | 112 | 2018 | -12.1 |
| Other Unbl. Kraft Paperboard | 1040 | 1121 | 101 | 83 | 99 | 84 | 1170 | 3.0 |
| Semichemical Paperboard | 4389 | 4730 | 451 | 435 | 439 | 411 | 5204 | 9.8 |
| Production for Export | 185 | 193 | 17 | 14 | 10 | 15 | 152 | -22.6 |
| Solid Bleached Paperboard | 3665 | 3926 | 351 | 330 | 346 | 331 | 4100 | 3.9 |
| Production for Export | 525 | 514 | 37 | 39 | 39 | 37 | 472 | -10.3 |
| Recycled Paperboard | 6476 | 7398 | 645 | 661 | 743 | 639 | 8075 | 8.3 |
| Production for Export | 13 | 24 | 2 | 2 | 2 | 2 | 18 | -29.0 |
| TOTAL PAPERBOARD-Prod.-Unadj. * | 29065 | 32177 | 2967 | 2883 | 2977 | 2773 | 34779 | 7.3 |
| - Containerboard Prod.(Dom. Use) | 17508 | 19173 | 1797 | 1766 | 1798 | 1738 | 21163 | 9.6 |
| - Boxboard Prod.(Dom. Use) (2) | 5150 | 5551 | 510 | 515 | 575 | 493 | 6071 | 8.8 |
| - All Other P'bd Prod.(D.U.) (2) | 3753 | 4397 | 390 | 374 | 422 | 377 | 4886 | 10.5 |
| - Total Paperbd Prod. for Export | 2654 | 3012 | 270 | 229 | 182 | 165 | 2660 | -12.6 |
| TOTAL PAPERBOARD PROD.- S.A. * | | | 2856 | 3032 | 2857 | 2779 | 34307 | 7.0 |
| TOTAL PAPER AND PAPERBOARD | | | | | | | | |
| Production - actual * | 59456 | 65010 | 5875 | 5665 | 5968 | 5556 | 69374 | 6.3 |
| Production - S.A. * | | | 5652 | 5933 | 5739 | 5581 | 68652 | 6.0 |

(1)Includes all exports of kraft paperboard.
(2)Data for unbl. kraft folding boxboard incl. in All Other P'bd.
* NOTE: Year 1984 contains one more day than year 1983.

P Preliminary
R Revised
S.A. Seasonally Adjusted

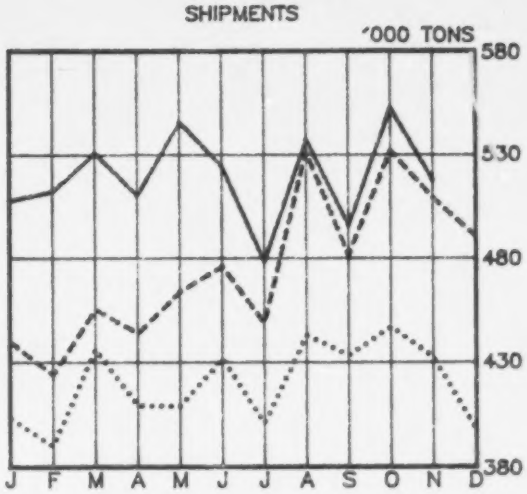
## GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



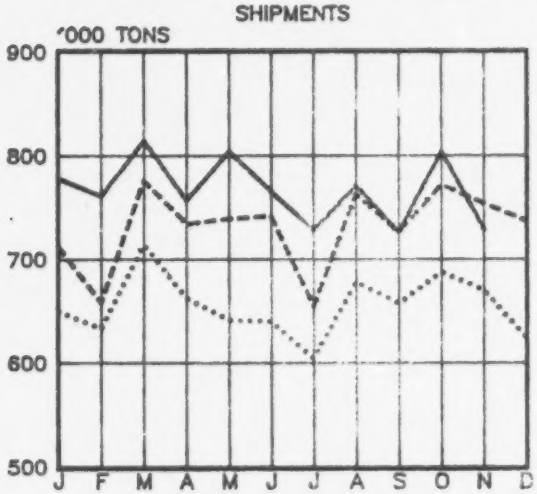

## COATED PAPER

SHIPMENTS



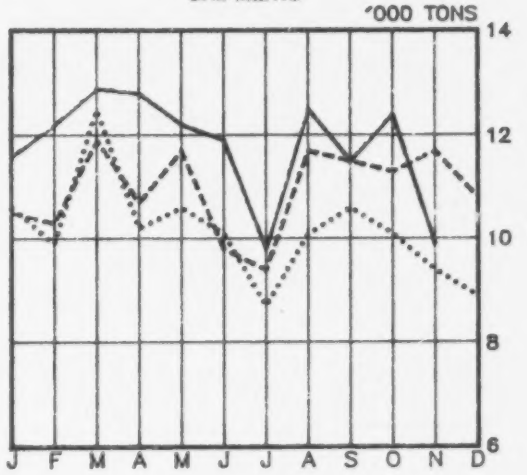

## UNCOATED FREE SHEET PAPERS

SHIPMENTS



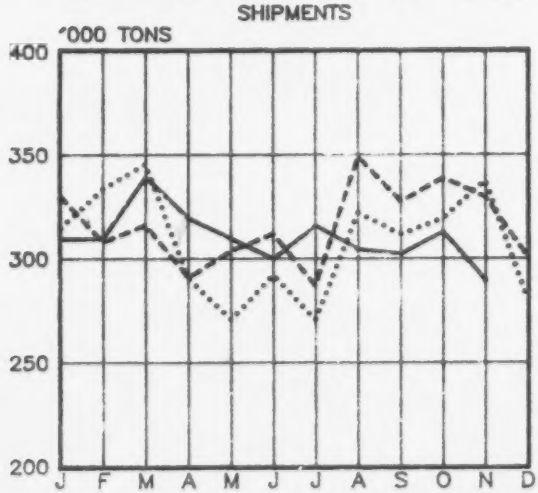

## COTTON FIBER PAPER

SHIPMENTS



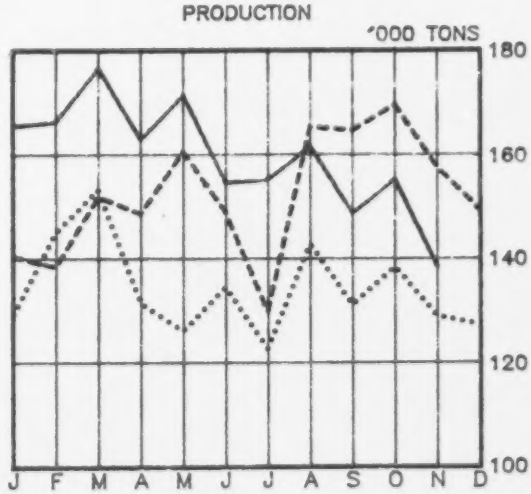

## UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS




## OTHER PAPER

PRODUCTION




1982 ····· 1983 - - - - - 1984 ———

# WOOD PULP STATISTICS
(Thousands of Tons)

| | YEAR 1982 | YEAR 1983 | JULY 1984 | AUG. 1984 | SEPT 1984 | OCT. 1984 | Annual Rate Y-T-D 1984* | % Change From same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| **TOTAL WOOD PULP** | | | | | R | P | | |
| Total Wood Pulp - Production | 49334 | 52537 | 4530 | 4791 | 4559 | 4798 | 56083 | 6.7 |
| - Imports | 3656 | 4093 | 357 | 389 | 386 | 344 | 4391 | 8.0 |
| - Exports | 3393 | 3644 | 279 | 318 | 285 | 284 | 3610 | -0.0 |
| - New Supply | 49595 | 52986 | 4608 | 4862 | 4660 | 4858 | 56864 | 7.2 |
| Dissolving Pulp - Production | 1092 | 1261 | 99 | 109 | 73 | 103 | 1222 | -1.9 |
| - Imports | 186 | 192 | 15 | 9 | 23 | 9 | 162 | -16.0 |
| - Exports | 631 | 647 | 41 | 43 | 49 | 48 | 602 | -2.3 |
| - New Supply | 647 | 806 | 73 | 74 | 47 | 64 | 782 | -5.5 |
| Paper Grades - Production | 39478 | 42358 | 3645 | 3891 | 3703 | 3875 | 45173 | 6.5 |
| Chemical Pulp - Imports | 3302 | 3706 | 321 | 355 | 330 | 323 | 3963 | 7.5 |
| - Exports | 2736 | 2958 | 229 | 272 | 232 | 232 | 2853 | 0.1 |
| - New Supply | 40044 | 43106 | 3736 | 3974 | 3800 | 3866 | 46183 | 7.0 |
| Groundwood and - Production | 5064 | 5067 | 471 | 461 | 458 | 467 | 5603 | 11.0 |
| Thermo-Mech. - Imports | 167 | 195 | 21 | 26 | 33 | 11 | 286 | 48.8 |
| - Exports | 27 | 40 | 9 | 3 | 4 | 4 | 55 | 27.8 |
| - New Supply | 5204 | 5222 | 483 | 483 | 487 | 474 | 5815 | 12.2 |
| Semi-Chemical - Production | 3699 | 3851 | 316 | 330 | 326 | 353 | 4085 | 5.9 |
| - Imports | 0 | 0 | | | | | | |
| - Exports | 0 | 0 | | | | | | |
| - New Supply | 3699 | 3851 | 316 | Included | with | Groundwood | Pulp | |
| | | | | 330 | 326 | 353 | 4085 | 5.9 |
| **MARKET WOOD PULP** | | | | | | | | |
| Total Market - Production | 5732 | 6478 | 572 | 583 | 546 | 635 | 6865 | 5.7 |
| Wood Pulp - Imports | 2443 | 2945 | 281 | 273 | 273 | 250 | 3194 | 10.3 |
| - Exports | 3143 | 3421 | 253 | 290 | 311 | 247 | 3478 | 1.4 |
| - New Supply | 5031 | 6002 | 599 | 575 | 507 | 638 | 6581 | 10.4 |
| Dissolving Pulp - Production | 1089 | 1260 | 98 | 109 | 73 | 103 | 1221 | -2.0 |
| - Imports | 194 | 210 | 20 | 9 | 11 | 13 | 185 | -10.9 |
| - Exports | 675 | 698 | 45 | 50 | 67 | 42 | 685 | 1.6 |
| - New Supply | 608 | 772 | 74 | 67 | 17 | 74 | 722 | -7.5 |
| Paper Grades - Production | 4643 | 5206 | 472 | 483 | 472 | 531 | 5630 | 7.5 |
| Chemical Pulp - Imports | 2202 | 2698 | 254 | 260 | 241 | 228 | 2819 | 10.1 |
| - Exports | 2468 | 2723 | 208 | 240 | 245 | 205 | 2794 | 1.4 |
| - New Supply | 4377 | 5181 | 518 | 503 | 468 | 554 | 5756 | 12.1 |
| Groundwood Pulp - Production | 1 | 12 | 1 | 1 | 1 | 1 | 14 | 16.5 |
| and All Other - Imports | 46 | 38 | 7 | 4 | 4 | 8 | 79 | 117.5 |
| - Exports | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0.0 |
| - New Supply | 47 | 49 | 7 | 5 | 5 | 10 | 92 | 93.4 |

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports - Department of Commerce.

# FIBROUS RAW MATERIALS
(Thousands of tons)

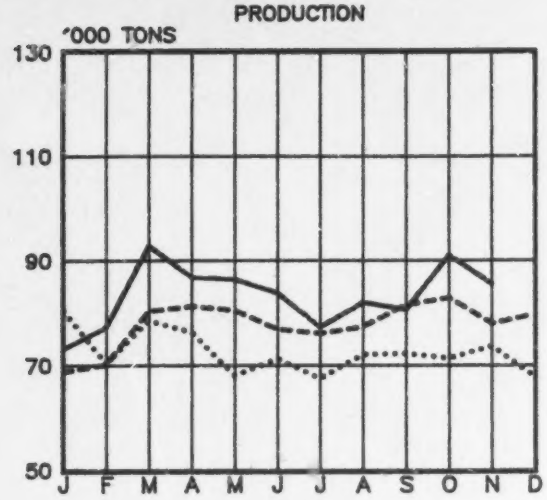
| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **CONSUMPTION AT PAPER & PAPERBOARD MILLS** | | | | | R | P | | |
| Total | 61332 | 65517 | 5646 | 6064 | 5771 | 6006 | 70584 | 7.9 |
| Total Wood Pulp | 47767 | 50978 | 4437 | 4694 | 4485 | 4617 | 54638 | 7.3 |
| Waste Paper | 13565 | 14539 | 1209 | 1370 | 1286 | 1389 | 15947 | 9.8 |
| **INVENTORIES** | | | | | | | | |
| Own Use Wood Pulp at Pulp Mills | 177 | 170 | 153 | 159 | 163 | 161 | 161 | -12.1 |
| Market Pulp at Pulp Mills | 437 | 384 | 379 | 409 | 415 | 500 | 500 | 10.8 |
| Mkt Pulp at Ppr. & Bd. Mills * | 429 | 504 | 542 | 508 | 508 | 499 | 499 | 5.9 |
| Waste Paper at Paper &Bd. Mills | 1022 | 920 | 934 | 955 | 931 | 976 | 976 | 13.0 |
| Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp | 37 | 26 | 30 | 29 | 30 | 34 | 34 | 13.3 |

SOURCES: Wood Pulp Data, Pulp Division, Pulp, Materials and Technology Group, API. Waste Paper Data, Paper Recycling Committee, API.

* - Census data prior to 1982; P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons

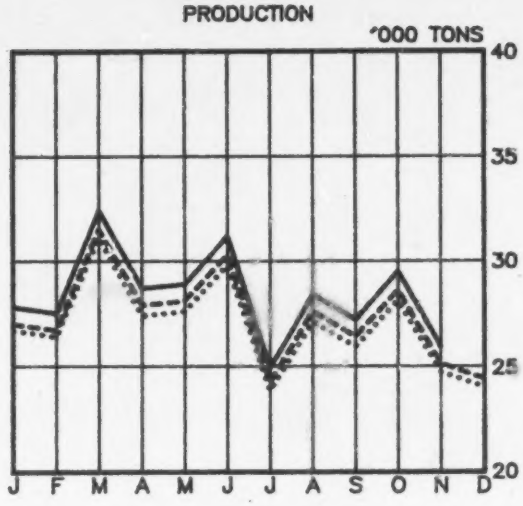
BLEACHED BRISTOLS

PRODUCTION



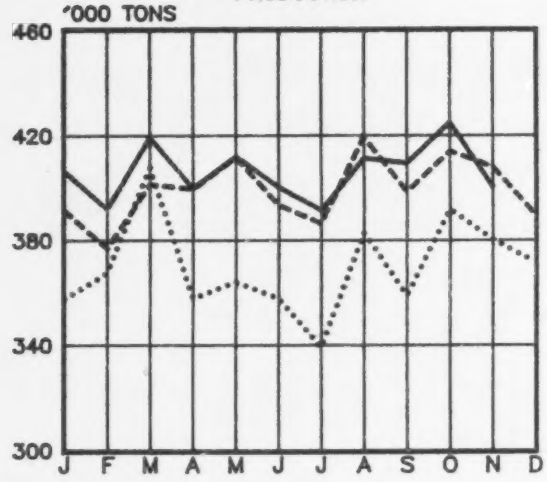

THIN PAPER

PRODUCTION



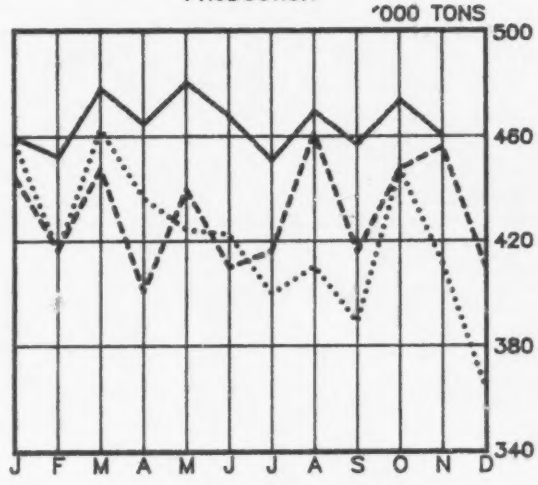

TISSUE PAPER

PRODUCTION



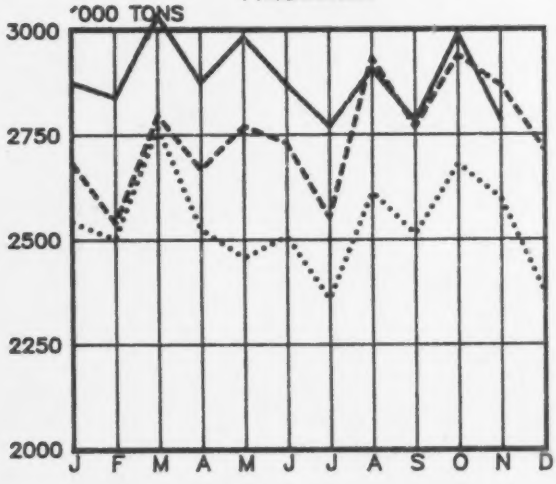

NEWSPRINT

PRODUCTION



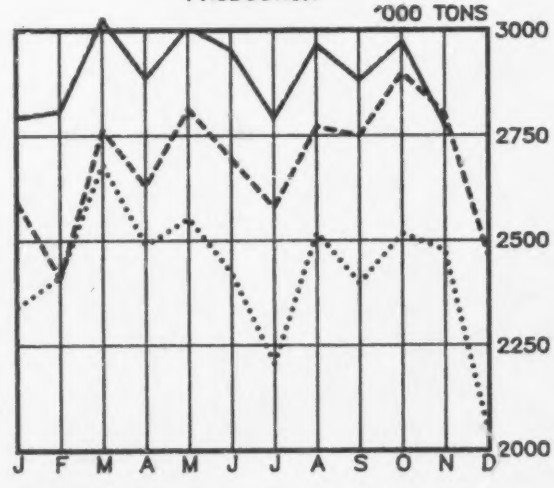

TOTAL PAPER

PRODUCTION




TOTAL PAPERBOARD

PRODUCTION




1982 ..... 1983 ----- 1984 ——

## FIBROUS RAW MATERIALS (Continued)
(Thousands of Standard (128 cubic Foot) Cords)

| | | YEAR 1982 | YEAR 1983 | JULY 1984 | AUG. 1984 | SEPT 1984 | OCT. 1984 | Annual Rate Y-T-D 1984 | % Change From same Period Last Year |
|---|---|---|---|---|---|---|---|---|---|
| PULPWOOD | | | | | | | | | |
| Total U.S. | - Total Receipts | 78519 | 84475 | 7197 | 7642 | 7398 | 7971 | 89104 | 5.2 |
| | - Total Consumpt. | 79039 | 85442 | 7192 | 7368 | 7246 | 7625 | 88342 | 3.1 |
| | - Residues * | 31152 | 32755 | 2547 | 2690 | 2526 | 2844 | 32489 | -1.4 |
| | - Inventories | 5426 | 5229 | 4621 | 4825 | 5023 | 5475 | 5475 | 0.8 |
| So. Atlantic | - Total Receipts | 23769 | 25736 | 2301 | 2336 | 2464 | 2702 | 27601 | 6.8 |
| | - Total Consumpt | 23725 | 25847 | 2301 | 2318 | 2464 | 2569 | 27407 | 5.4 |
| | - Residues * | 8273 | 7904 | 660 | 684 | 680 | 770 | 8254 | 3.8 |
| | - Inventories | 1165 | 1163 | 1038 | 1045 | 1163 | 1366 | 1366 | 15.8 |
| Northeast | - Total Receipts | 7283 | 7051 | 577 | 615 | 623 | 698 | 7450 | 7.3 |
| | - Total Consumpt | 7221 | 7274 | 542 | 574 | 595 | 670 | 7561 | 4.8 |
| | - Residues * | 1452 | 1199 | 115 | 146 | 133 | 136 | 1474 | 25.9 |
| | - Inventories | 652 | 577 | 422 | 481 | 491 | 531 | 531 | -1.1 |
| South Central | - Total Receipts | 26510 | 29409 | 2555 | 2789 | 2529 | 2627 | 31069 | 5.0 |
| | - Total Consumpt | 27153 | 29152 | 2618 | 2708 | 2483 | 2511 | 30635 | 4.7 |
| | - Residues * | 8616 | 9218 | 757 | 822 | 705 | 821 | 9126 | -2.4 |
| | - Inventories | 1346 | 1536 | 1191 | 1215 | 1186 | 1354 | 1354 | -16.8 |
| North Central | - Total Receipts | 5601 | 6265 | 576 | 632 | 526 | 572 | 6988 | 11.0 |
| | - Total Consumpt | 5706 | 6343 | 523 | 558 | 511 | 543 | 6677 | 5.0 |
| | - Residues * | 1517 | 1822 | 121 | 138 | 116 | 118 | 1518 | -17.4 |
| | - Inventories | 925 | 851 | 817 | 855 | 866 | 883 | 883 | 1.5 |
| West | - Total Receipts | 15356 | 16014 | 1188 | 1270 | 1256 | 1372 | 15995 | -0.6 |
| | - Total Consumpt | 15234 | 16826 | 1208 | 1209 | 1183 | 1332 | 16062 | -4.8 |
| | - Residues * | 11294 | 12612 | 894 | 900 | 892 | 898 | 12118 | -4.1 |
| | - Inventories | 1338 | 1102 | 1152 | 1229 | 1317 | 1341 | 1341 | 10.4 |

* - Consumption of Residues in Cord Equivalents. SOURCE: American Pulpwood Association

## UNITED STATES TRADE WITH CANADA
IMPORTS FROM CANADA

| | YEAR 1983 Tons | YEAR 1983 $000 | SEPT 1984 Tons | SEPT 1984 $000 | OCT. 1984 Tons | OCT. 1984 $000 | Annual Rate Y-T-D 1984 | % Change From same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| Pulpwood, Roundwood (in cords of 128 cubic Feet) | 155124 | 7471 | 18136 | 818 | 23195 | 1185 | 196015 | 76.4 |
| Pulpwood Chips | 1987168 | 48979 | 158729 | 3470 | 119384 | 2654 | 2164482 | 7.8 |
| Wood Pulp, Total | 3755201 | 1363975 | 332935 | 142190 | 327084 | 141843 | 4020732 | 8.7 |
| Waste Fibrous Materials, Total | 157732 | 26491 | 12681 | 2027 | 13638 | 2181 | 158168 | 0.8 |
| Paper, Board & Products,Total | 8274914 | 3372726 | 808620 | 353334 | 800038 | 356137 | 8404677 | 14.6 |
| Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. | 8221322 | 3274062 | 802578 | 343207 | 792768 | 343055 | 9335823 | 14.5 |
| Paper Paperboard & Products | 7846516 | 3277974 | 762046 | 342546 | 749084 | 345004 | 8932269 | 15.2 |
| Paper & Paperboard, Only | 7792924 | 3179310 | 756003 | 332419 | 741816 | 331922 | 8863415 | 15.1 |
| Paper, Total | 7633585 | 3139193 | 739155 | 327375 | 725458 | 326888 | 8645314 | 14.6 |
| Newsprint | 6845135 | 2732234 | 646871 | 276142 | 633524 | 276481 | 7688890 | 13.6 |
| Printing,Writing & Rel.Par. | 695907 | 348512 | 80734 | 43666 | 78788 | 42353 | 831503 | 21.8 |
| Pack. & Ind. Conv. Paper | 79209 | 46889 | 8865 | 5458 | 8901 | 5028 | 101182 | 26.8 |
| Special Industrial Paper | 2732 | 4473 | 346 | 554 | 235 | 406 | 3342 | 17.0 |
| Tissue Paper | 10602 | 7085 | 2340 | 1554 | 4009 | 2620 | 20396 | 93.9 |
| Paperboard, Total | 159339 | 40117 | 16848 | 5045 | 16358 | 5034 | 218101 | 40.5 |
| Convtd Paper&Paperbd Products | 53592 | 98664 | 6043 | 10126 | 7269 | 13082 | 68854 | 31.5 |
| Wet Machine Board | 3036 | 1916 | 102 | 66 | 183 | 125 | 2151 | -31.2 |
| Construction Paper & Board | 425362 | 92836 | 46472 | 10722 | 50771 | 11008 | 470257 | 4.8 |

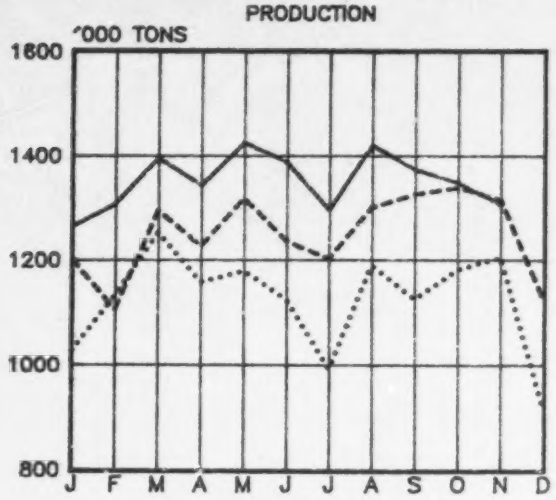
EXPORTS TO CANADA

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Pulpwood, Roundwood (in cords of 128 cubic Feet) | 68965 | 4381 | 6757 | 174 | 11424 | 612 | 84971 | 22.0 |
| Pulpwood Chips | 38246 | 2026 | 1568 | 72 | 2668 | 118 | 30881 | -25.4 |
| Wood Pulp, Total | 133633 | 55369 | 11884 | 5497 | 26856 | 11727 | 181385 | 31.3 |
| Cotton Pulp & Other Pulp | 9567 | 5287 | 874 | 620 | 370 | 211 | 10362 | 6.0 |
| Waste Paper | 346809 | 39478 | 28203 | 3169 | 25138 | 3088 | 335287 | -2.3 |
| Paper, Board & Products,Total | 659229 | 471256 | 47646 | 38328 | 68737 | 48296 | 763483 | 15.2 |
| Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board | 448117 | 306687 | 36774 | 26461 | 54338 | 33403 | 566641 | 24.1 |
| Paper, Paperboard & Products | 628109 | 459325 | 45783 | 37496 | 66148 | 47127 | 732488 | 18.0 |
| Paper & Paperboard, Only | 416998 | 284756 | 34810 | 25629 | 51749 | 32234 | 535646 | 26.0 |
| Paper, Total | 230771 | 210626 | 17183 | 17658 | 24204 | 22267 | 297125 | 28.5 |
| Newsprint | 4312 | 3805 | 303 | 256 | 280 | 244 | 4792 | 12.1 |
| Printing,Writing & Rel.Par. | 125110 | 101541 | 8762 | 8890 | 13981 | 12789 | 139730 | 11.4 |
| Pack. & Ind. Conv. Paper | 34403 | 20921 | 2876 | 1987 | 3548 | 2186 | 45216 | 39.1 |
| Special Industrial Paper | 63390 | 81389 | 3979 | 6159 | 5664 | 6584 | 103840 | 59.5 |
| Tissue | 3556 | 2869 | 263 | 365 | 720 | 465 | 3546 | -10.1 |
| Paperboard, Total | 186226 | 84131 | 17728 | 7872 | 27545 | 9967 | 238521 | 23.1 |
| Convtd Paper&Paperbd Products | 211112 | 164568 | 10872 | 11867 | 14399 | 14893 | 196842 | -4.5 |
| Wet Machine Board | 5288 | 2976 | 309 | 224 | 475 | 298 | 5261 | -1.2 |
| Construction Pap & Bd. E | 25831 | 8955 | 1554 | 608 | 2114 | 871 | 25733 | -2.3 |

SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

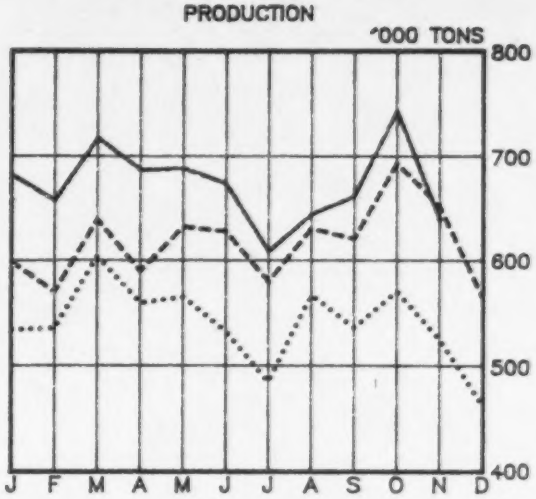
## UNBLEACHED KRAFT LINERBOARD

PRODUCTION



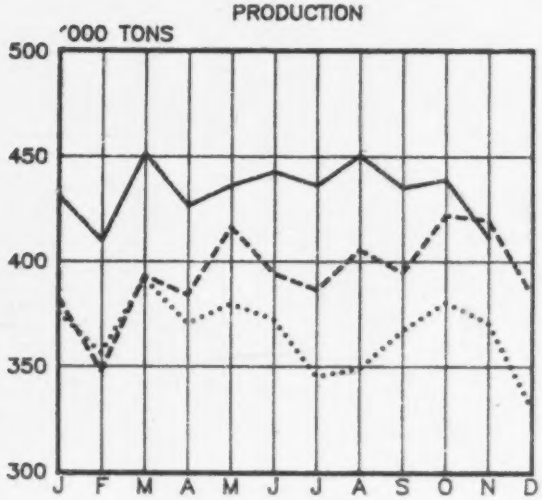

## RECYCLED PAPERBOARD

PRODUCTION



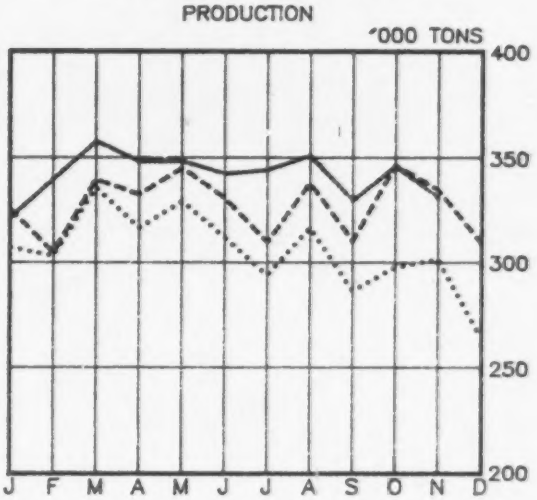

## SEMICHEMICAL PAPERBOARD

PRODUCTION



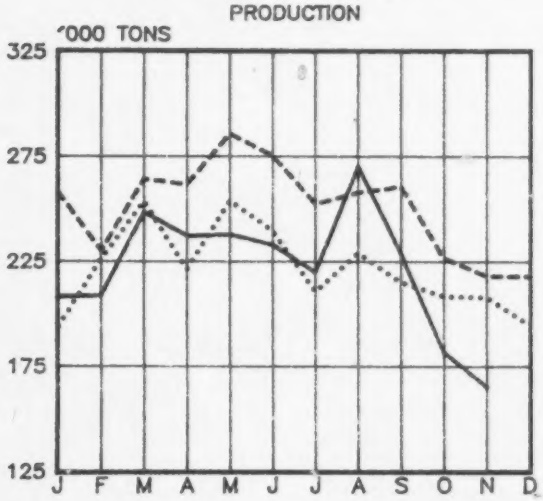

## SOLID BLEACHED PAPERBOARD

PRODUCTION



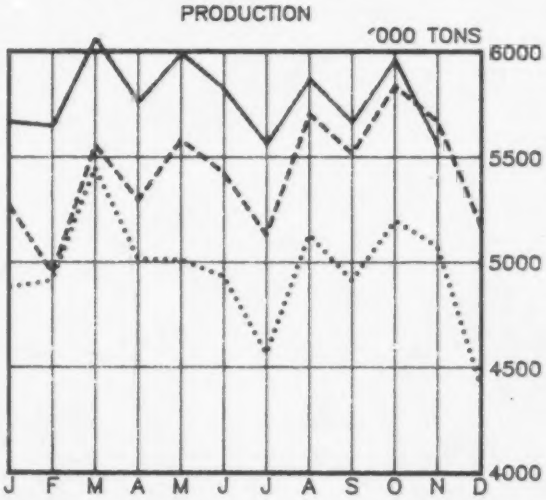

## PAPERBOARD FOR EXPORT

PRODUCTION




## TOTAL PAPER AND PAPERBOARD

PRODUCTION




1982 ····· 1983 - - - - - 1984 ——

# PULP PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

## I M P O R T S

| | YEAR 1983 Tons | YEAR 1983 $000 | SEPT 1984 Tons | SEPT 1984 $000 | OCT. 1984 Tons | OCT. 1984 $000 | (1) Annual Rate Y-T-D 1984 | % Change from same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| Pulpwood Roundwood (cords) | 155124 | 7471 | 18151 | 819 | 23195 | 1195 | 196093 | 76.4 |
| Pulpwood Chips | 1991453 | 49104 | 158731 | 3471 | 119458 | 2656 | 2165297 | 7.6 |
| Total All Imports | 13248280 | 5526141 | 1370638 | 645280 | 1279083 | 606688 | 15712001 | 20.3 |
| Wood Pulp Total | 4093436 | 1472478 | 386007 | 163146 | 343694 | 149135 | 4390997 | 8.0 |
| Waste Paper | 100410 | 10537 | 8848 | 1129 | 9656 | 1042 | 111228 | 10.2 |
| Other Fibrous Materials | 68003 | 24272 | 4364 | 1881 | 5726 | 1816 | 69824 | 5.0 |
| Paper Board & Products Total | 8886431 | 4018855 | 970319 | 479124 | 920006 | 454695 | 11139953 | 26.2 |
| Paper Paperboard Wet Machine Bd. & Construction Paper & Board | 8834560 | 3582292 | 949382 | 427813 | 900840 | 407733 | 10920916 | 25.8 |
| Paper Prbd & Prds ex Cnst&WMB | 8509180 | 3911591 | 919814 | 467050 | 864302 | 442317 | 10619905 | 27.6 |
| Paper & Paperboard Only | 8357309 | 3475028 | 898877 | 415740 | 845136 | 395355 | 10400868 | 27.2 |
| Paper Total | 8189491 | 3426888 | 880545 | 409932 | 827072 | 389222 | 10153599 | 26.7 |
| Newsprint | 6819348 | 2757524 | 666312 | 283088 | 648505 | 281539 | 7910889 | 15.8 |
| Printing & Writing | 1151011 | 587426 | 189173 | 115617 | 162721 | 96826 | 2066112 | 93.9 |
| Uncoated Groundwood | 732237 | 331017 | 111872 | 58112 | 81415 | 43279 | 1050685 | 56.0 |
| Uncoated Book | 154147 | 88832 | 19631 | 11679 | 30909 | 17490 | 263984 | 86.1 |
| Coated Print.& Impres. Pap | 162441 | 101289 | 45994 | 32177 | 37813 | 27195 | 418112 | 194.2 |
| Bristols | 471 | 557 | 63 | 97 | 43 | 45 | 661 | 57.6 |
| Writing and Similar Paper | 81458 | 46718 | 16715 | 9601 | 10569 | 6825 | 241528 | 264.4 |
| Thin (except Cigarette) | 20258 | 19213 | 5097 | 3951 | 1872 | 1993 | 51139 | 225.4 |
| Total Pkg & Other Paper | 107515 | 75694 | 11676 | 8600 | 11024 | 7639 | 148587 | 41.1 |
| Unbleached Kraft Paper | 42013 | 17454 | 3617 | 1645 | 2651 | 1187 | 44757 | 7.1 |
| Other Pkg. & Indust. Paper | 65503 | 58240 | 8059 | 6955 | 8373 | 6452 | 103831 | 83.4 |
| Tissue | 11617 | 8225 | 3783 | 2627 | 4822 | 3218 | 28000 | 144.7 |
| Paperboard, Total | 167818 | 48160 | 17932 | 5808 | 18064 | 6133 | 247269 | 50.6 |
| Test or Containerboard | 48119 | 13042 | 4195 | 1498 | 5599 | 1908 | 70681 | 47.2 |
| Semi-Chemical Corrugating | 69564 | 14509 | 8798 | 2278 | 6594 | 1696 | 104724 | 59.0 |
| Other Paperboard | 50136 | 18609 | 4939 | 2031 | 5871 | 2532 | 71854 | 42.9 |
| Convtd Paper&Paperbd Products | 151872 | 436563 | 20937 | 51311 | 19166 | 46962 | 218037 | 49.5 |
| Paper Products, Total | 124816 | 373966 | 17284 | 43783 | 16043 | 41687 | 184087 | 54.5 |
| Paperboard Products, Total | 27055 | 62597 | 3653 | 7528 | 3123 | 5276 | 34948 | 27.8 |
| Wet machine Board | 3584 | 2422 | 143 | 109 | 203 | 139 | 2902 | -18.1 |
| Construction Paper & Board | 473667 | 104842 | 50357 | 11965 | 55501 | 12238 | 517146 | 3.6 |
| Notes | | | | | | | | |
| Other: No Weight Avail. ($000) | | 148251 | | 18869 | | 17275 | 188775 | 35.2 |
| Total Imports Incl. Other($000) | | 5674392 | | 664149 | | 623964 | 7364325 | 32.4 |

## E X P O R T S

| | | | | | | | (1) | |
|---|---|---|---|---|---|---|---|---|
| Pulpwood, Roundwood (cords) | 69497 | 4405 | 6757 | 174 | 11424 | 612 | 85360 | 21.4 |
| Pulpwood Chips | 2554178 | 171269 | 218751 | 16383 | 137426 | 10588 | 2324542 | -10.1 |
| Total All Exports | 10888949 | 4221511 | 988811 | 383171 | 943242 | 377718 | 11471807 | 6.6 |
| Wood Pulp,Total | 3643963 | 1362022 | 284526 | 124673 | 283879 | 123035 | 3608846 | -0.0 |
| Cotton Pulp and Other Pulp | 102863 | 89805 | 6118 | 4240 | 4840 | 4274 | 84961 | -16.4 |
| Waste and Old Paper | 2573718 | 308915 | 299183 | 37766 | 295060 | 35858 | 3248064 | 30.5 |
| Paper, Board & Products,Total | 4568407 | 2480769 | 398984 | 226492 | 359463 | 214751 | 4530936 | -0.7 |
| Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board | 3984277 | 1717768 | 357236 | 166631 | 311713 | 150122 | 3946850 | -1.0 |
| Paper, Prbd & Prod ex Cnst&WMB | 4501039 | 2448778 | 393600 | 223304 | 353454 | 211234 | 4450852 | -1.1 |
| Paper & Paperboard, Only | 3816910 | 1685778 | 351851 | 163443 | 305705 | 146604 | 3868565 | -1.4 |
| Paper, Total | 773414 | 599370 | 65918 | 51512 | 63393 | 53767 | 811275 | 3.1 |
| Newsprint | 284870 | 127119 | 28313 | 13231 | 24442 | 11029 | 308838 | 2.7 |
| Printing & Writing | 201798 | 198304 | 14234 | 15459 | 19789 | 22249 | 205415 | 1.7 |
| Uncoated Groundwood | 37289 | 33300 | 3007 | 2631 | 3298 | 3114 | 30327 | -18.9 |
| Clay Coated Paper | 78182 | 80033 | 5264 | 4539 | 7720 | 8685 | 87694 | 12.7 |
| Uncoated Free Sheet | 59125 | 71662 | 4312 | 6108 | 6459 | 8805 | 84969 | 8.6 |
| Other Printing & Writing | 26202 | 33310 | 1650 | 2181 | 2312 | 3645 | 22424 | -16.5 |
| Total Pkg. & Other Paper | 260865 | 255086 | 21109 | 21018 | 17701 | 19029 | 281567 | 4.5 |
| Unbleached Kraft | 116170 | 43227 | 10837 | 4176 | 6209 | 2839 | 109197 | -8.5 |
| Other Pkg. & Indust. Paper | 144695 | 211859 | 10272 | 16841 | 11492 | 16189 | 172369 | 14.9 |
| Tissue | 15881 | 18881 | 1264 | 1805 | 1460 | 1460 | 17455 | 8.2 |
| Paperboard, Total | 3143496 | 1086408 | 285932 | 111931 | 242313 | 92837 | 3055291 | -2.5 |
| Solid Wood Pulp | 2893868 | 1016184 | 271105 | 104941 | 221515 | 85543 | 2892021 | -2.8 |
| Total Linerboard | 2254538 | 575862 | 211747 | 68721 | 173165 | 56529 | 2163669 | -4.0 |
| Bleached Kraft Linerboard | 160253 | 64914 | 11841 | 5567 | 15747 | 6479 | 135427 | -7.1 |
| Unbleached Kraft Linerbd | 2094285 | 510948 | 199906 | 63154 | 157418 | 50050 | 2028241 | -3.7 |
| Other Unbleached Kraft | 107141 | 51822 | 12218 | 5352 | 5007 | 2772 | 120346 | 17.7 |
| Other Bleached Kraft | 558431 | 371357 | 43809 | 29712 | 40488 | 25348 | 569485 | 3.8 |
| Semi-Chemical Corrugating | 73758 | 17144 | 3331 | 1157 | 2854 | 894 | 38521 | -48.1 |
| Recycled Paperboard | 149628 | 70224 | 14827 | 6990 | 20797 | 7294 | 163270 | 4.2 |
| Convtd Paper&Paperbd Products | 584129 | 763001 | 41748 | 59861 | 47749 | 64630 | 584086 | 1.1 |
| Paper Products, Total | 311722 | 535596 | 20299 | 38599 | 21672 | 41922 | 297813 | -4.1 |
| Paperboard Products, Total | 272408 | 227406 | 21449 | 20262 | 26077 | 22707 | 286273 | 7.1 |
| Wet Machine Board | 11622 | 5420 | 878 | 446 | 1072 | 546 | 13701 | 19.0 |
| Construction Paper & Board E | 55746 | 26570 | 4507 | 2742 | 4937 | 2972 | 66583 | 22.8 |
| Notes | | | | | | | | |
| Other: No Weight Avail. ($000) | | 7965 | | 675 | | 679 | 8922 | 12.4 |
| Total Exports Incl. Other($000) | | 4229475 | | 393846 | | 378397 | 4590515 | 9.5 |

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Incl. estim. of tonnage based on square foot data.
(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES
1967 = 100

| | 1982 | 1983 | AUG. | SEPT | OCT. | NOV. | Annual Rate Y-T-D 83 | % Change From same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| Pulp, Paper and Products except Building Grades | 273.2 | 271.4 | 296.3 | 297.2 | 298.3 | 299.4 | 292.4 | 8.0 |
| Pulp Paper & Products, ex. Building Grades & ex Waste Paper # | 275.9 | 273.3 | 297.0 | 298.0 | 299.4 | 304.5 | 293.7 | 7.6 |
| Total Wood Pulp | 379.1 | 347.1 | 410.0 | 408.5 | 398.5 | 398.4 | 395.2 | 14.0 |
| Total Paper | 286.3 | 282.3 | 306.8 | 306.7 | 308.0 | 308.2 | 302.8 | 7.5 |
| Total Paper, exc. Newsprint | 278.3 | 277.0 | 304.5 | 303.6 | 303.1 | 303.6 | 301.1 | 9.0 |
| Newsprint | 315.8 | 303.0 | 330.7 | 331.2 | 338.2 | 336.9 | 323.0 | 6.8 |
| Total Paperboard | 254.9 | 250.8 | 285.4 | 288.2 | 291.8 | 293.4 | 279.5 | 11.8 |
| Total Paper and Paperboard # | 276.5 | 272.4 | 300.2 | 300.9 | 302.9 | 303.6 | 295.5 | 8.8 |
| Converted Products | 284.4 | 285.4 | 282.4 | 283.8 | 285.8 | 288.1 | 280.0 | 5.6 |
| Waste Paper | 121.1 | 158.6 | 254.5 | 249.6 | 235.6 | 221.4 | 243.2 | 58.2 |
| All Commodities | 298.3 | 303.1 | 310.8 | 309.5 | 309.4 | 310.4 | 310.4 | 2.5 |
| Industrial Commodities | 312.3 | 315.7 | 323.5 | 322.3 | 323.2 | 323.8 | 322.5 | 2.2 |

SOURCE: Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor # Computed by API

Continued from Page 2

## IMPORTS, EXPORTS AND NEW SUPPLY

Although imports of wood pulp, paper and paperboard in October 1984 eased slightly from the record-breaking high of the preceding four months, their levels continued to exceed year-ago rates. Exports declined in October, remaining well below year-earlier levels. This pattern of a high rate of imports relative to that of exports continues the trend evident throughout 1984. Both are a reflection of the strong U.S. dollar, which impairs the competitive position of exports and strengthens that of imports.

In the first ten months of 1984 the total value of imports was at the average rate of $7.4 billion per year -- 32% above its year-ago level -- while exports ran at $4.6 billion per year -- 9.5% above its year-ago level.

Continued on Page 11

Continued from Page 10

These trends also indicate that the rate of new supply (production plus imports less exports, a proxy for the rate of consumption) of paper and paperboard has been somewhat above that of domestic production. The upper panel of the enclosed yellow industry data sheet shows that new supply of paper and paperboard in the first 11 months of 1984 was about 10% above its year-ago level, compared with a 7% increase in domestic production. The 10% increase in the new supply of paper and paperboard compares to the 6.8% increase in the real gross national product shown for all of 1984. The ratio of new supply to real GNP -- 45,500 tons of new supply per billion dollars of real GNP -- if it holds for the full year -- would exceed the ratio reached in 1976. That year had marked the recovery from the 1975 recession, and its performance had not been matched in the entire 1977-1983 period.

## WAGE RATES AND PRODUCTIVITY

The Employee Relations Department of the American Paper Institute reports that negotiated first year increases at wood pulp, paper and paperboard mills continued their downward trend in 1984. The nationwide figure, based on data from 119 mills, showed a 3.7% gain in the first year; the 1983 increase was 5.6%. A major factor has been the negotiation pattern at many of the West Coast mills, where a 0% first year wage package with a $1,000 lump sum payment was negotiated.

The matter of health care costs containment continues to be a major area of attention for many companies in the industry. Comprehensive plans, premium sharing and increased deductibles are among the measures which have been installed at some mills.

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Continued from Page 11

Other changes include the fact that some recent labor agreements have provided for the lifting of operating restrictions on many holidays. This gives greater flexibility to production planning.

The Bureau of Labor Statistics recently published new estimates of output per production worker manhour and output per employee manhour of all wood pulp, paper and paperboard mills for 1983, together with revised estimates for some of the earlier years. The report shows output per production worker manhour in 1983 at an index level of 118 (1977=100), 8.9% above the 1982 level. The American Paper Institute's estimate of this figure for the first 10 months of 1984, (based upon its own production data and estimates of manhours worked at wood pulp, paper and paperboard mills as published by the Bureau of Labor Statistics) indicates that output per production worker man-hour in the first 10 months of 1984 rose an additional 3%. The 1982-1983 increase was typical of the early stages of a strong recovery, while the smaller gain reflected the usual performance for a maturing recovery.

The Bureau of Labor Statistics also publishes estimates of output per employee hour for these industries. Their 1983 figure was 115.8 (1977=100), also 8.9% above the 1982 level. A similar gain of 3% for 1984 in this measure of productivity is likely.